



RECHTER

WEALTH MANAGEMENT

Your financial future. Thoughtfully planned. Personally managed.

About Rechter Wealth Management

Founded in 2003 by Peter J. Rechter, CFP®, and joined by Sean Palmer in 2022, RWM is a fee-only financial advisory firm providing personalized financial planning and portfolio management. As a CFP and CPA team, we combine financial and tax expertise to create clear, personalized strategies. Services include retirement planning, tax planning, and investment management tailored to your objectives. The firm is built on the belief that financial success comes from thoughtful planning, disciplined investing, and a trusted, transparent relationship.

Our Promise

No commissions, no fund kickbacks, no product incentives — your best interests come first.

Services Overview

Financial Planning

Comprehensive, customized plans addressing cash flow, retirement, education, tax, and estate objectives. Complimentary initial consultation.

Portfolio Management

Non-discretionary portfolio management using no-load mutual funds, with assets custodied at Fidelity Institutional. Fee-only and fully transparent pricing. **A minimum of \$500,000 in assets is required.**

Why Choose RWM

- Fiduciary commitment: We act solely in your best interest.
- Independent and boutique: No proprietary products.
- Deep expertise: CFP® and CPA perspectives.
- Clear communication: Quarterly reviews.
- Complimentary initial consultation.
- Competitive pricing.

Our Process

1. Discovery & Goal Setting – Complimentary consultation to learn about your financial picture and objectives.
2. Plan Design – Tailored financial plan with actionable strategy.
3. Investment Strategy – Portfolio construction and implementation.
4. Ongoing Review – Continuous monitoring and strategic updates.

Transparent Fees

Financial Planning:

Beginning at \$1,500 (complimentary for portfolio management clients with over \$1M of managed assets).

Portfolio Management:

- \$0 – \$499,999: 1.00%
- \$500,000 – \$999,999: 0.85%
- \$1,000,000 – \$2,000,000: 0.65%
- Over \$2,000,000: 0.50%

Contact Us

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